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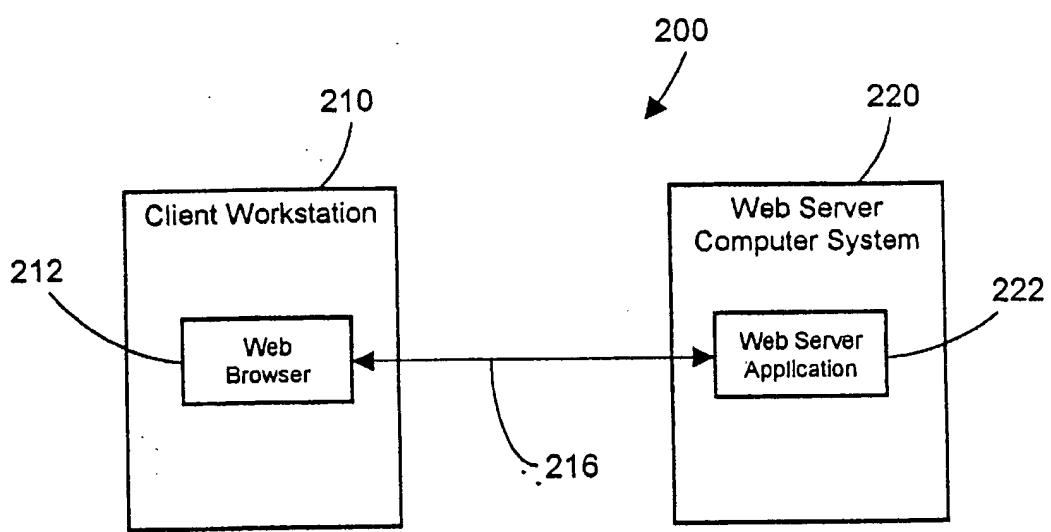


Figure 1A

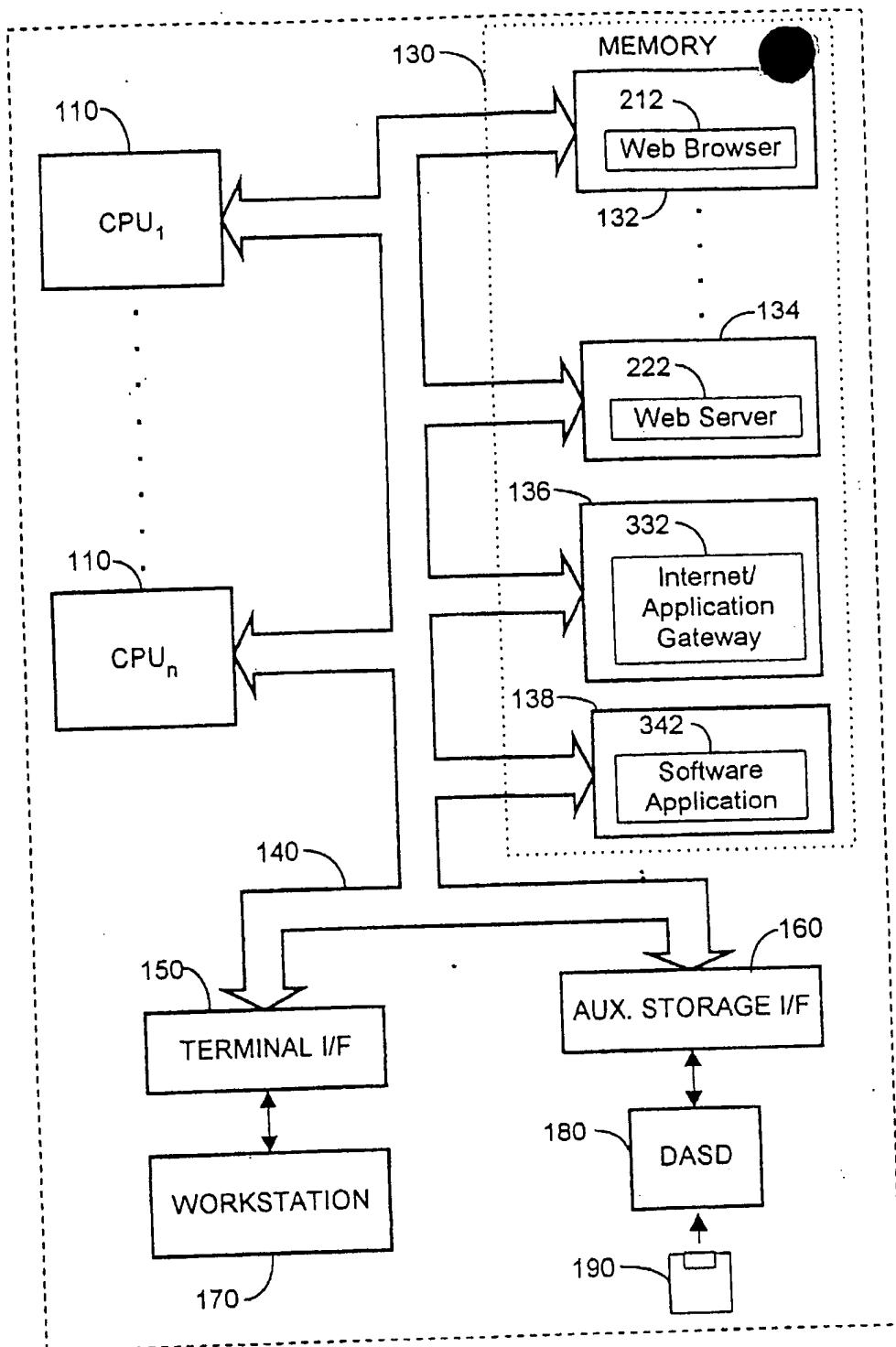


Figure 1B

# **SURETY 2000**

## **BID BOND MANAGER**

**Bid Bond Approval System Version 1.0**

<a href="#">Login</a>
<a href="#">Introduction</a>
<a href="#">Jobs</a>
<a href="#">News</a>
<a href="#">Documentation</a>
<a href="#">FAQ</a>
<a href="#">Help</a>

- Enter your login information and push the Login button.  
You must have a valid user name and password to access the system!

User Name:  Password:

**Authorized access only!**  
**Do NOT give your user information to ANYONE!**

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This is the login page. In order to use Surety2000 you must receive a user name and password from Surety2000. At least one participating surety must authorize you first. Then Surety2000 will give you the necessary user and password.

For purposes of this presentation we will use the user name "insurance" and password "john". After the user name and password are inserted you will click on "login".

Figure 1C

# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/2/99

• Agency Main Menu:

<a href="#">Login</a>
<a href="#">Main Menu</a>
<a href="#">Contractors</a>
<a href="#">Employees</a>
<a href="#">FAQ</a>
<a href="#">Documentation</a>
<a href="#">Help</a>

<a href="#">New Bond</a>	<a href="#">Search Bonds</a>	<a href="#">Approved Bonds 180+</a>	<a href="#">Pending Bonds</a>	<a href="#">Dead Bonds</a>
--------------------------	------------------------------	-------------------------------------	-------------------------------	----------------------------

Search Approved Bonds By:

Owner/Obligee	<input type="text"/>	<input type="button" value="Search"/>
---------------	----------------------	---------------------------------------

Contractor	<input type="text"/>	<input type="button" value="Search"/>
------------	----------------------	---------------------------------------

Bond Number	<input type="text"/>	<input type="button" value="Search"/>
-------------	----------------------	---------------------------------------

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This is the main menu. The system has identified the user and the date. From here you can navigate to any part of the system. Look across the horizontal bar. You can enter a new bond, search for an approved bid bond, search for an approved bid bond that is over 180 days old, search for a pending bond, or search for a dead bond.

Let's start by searching for all pending bid bonds. A pending bid bond is a bid bond that has been entered into the system but, is waiting to be approved.

Click on "pending bonds" on the horizontal bar.

Figure 2

3/2/99 10:17 PM

# **SURETY 2000**

## **BID BOND MANAGER**

*Bid Bond Approval System Version 1.0*

Insurance Agency  
John Doe

3/1/99

Agency Pending Bonds Search

<a href="#">Login</a>	<a href="#">New Bond</a>	<a href="#">Search Bonds</a>	<a href="#">Approved Bonds 180+</a>	<a href="#"><b>Pending Bonds</b></a>	<a href="#">Dead Bonds</a>
-----------------------	--------------------------	------------------------------	-------------------------------------	--------------------------------------	----------------------------

Search Pending Bonds by:

Owner/Obligee

Contractor

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You will see that the "Pending Bond" section in the horizontal bar is highlighted. You may enter the name of a contractor or owner/obligee and do a specific search. Let's search for all of your pending bonds. (remember that the system knows who you are what bonds you are authorized to view)

To search for all pending bid bonds simply leave the fields blank and click on the "search box" next to the contractor field.

Figure 3



# **SURETY 2000**

## **BID BOND MANAGER**

*Bid Bond Approval System Version 1.0*

Insurance Agency  
John Doe

3/2/99

**Surety Pending Bonds Menu**

<a href="#">Login</a>	<a href="#">New Bond</a>	<a href="#">Search Bonds</a>	<a href="#">Approved Bonds 180+</a>	<a href="#">Pending Bonds</a>	<a href="#">Dead Bonds</a>
-----------------------	--------------------------	------------------------------	-------------------------------------	-------------------------------	----------------------------

You may select View/Edit from the table below: Page 1 of 1

Bid Date	Contractor	Owner/Obligee	Surety
2/21/99	ABC CONTRACTING, INC.	City of New York Department of Design and Construction	Liberty Mutual Insurance
2/22/99	ABC CONTRACTING, INC.	United States General Services Administration	Liberty Mutual Insurance

Owner/Obligee

Contractor

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This is a very valuable tool for the surety agent. As each bid bond is entered into the system for your agency, the bid bond will be listed here in chronological order of bid date. This screen can be used as a daily work list of bid bonds to be approved. The appropriate surety company can see the pending bid bond and accept it as the bid bond request. To the right of the screen is "edit" and "view". (sorry, the printer cannot print items that you must scroll to the right to see on a monitor.)

Let's click edit. (remember, you cannot see "edit" here but, you will be able to see it on your monitor).

Figure 4

# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/2/99

•Edit Bond:

<a href="#">Login</a>
<a href="#">Main Menu</a>
<a href="#">Contractors</a>
<a href="#">Employees</a>
<a href="#">FAQ</a>
<a href="#">Documentation</a>
<a href="#">Help</a>

Contractor Information:

Contractor: **ABC CONTRACTING, INC.**  
 Address: **100 SMITH STREET**  
 City: **ANYWHERE**  
 State: **New York**  
 Zip Code: **1111111**

Owner/Job Information:

Owner/Obligee: **City of New York Department of Design and Construction**

Bid Bond Form: **AIA Document A310**

Address:

City: **Long Island City**

State: **New York**

Zipcode: **10031**

Bid Date: **2 / 21 / 1999**

Estimated Contract Price: **optional**

Amount of Bid Security: **ten percent of bid amount**

Contract # or IFB# **456123**

**description of project here.**

Description of Job:

Still Pending

Approved

Dead

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This is a pending bid bond. It is a review of the information as it will appear when it is approved. You can change the bid date, estimated contract price, amount of bid bond, ifb number and the description of the job. Then you can return it into the pending list, approve the bid bond, or send it into the dead file where it cannot return.



# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/1/99

Enter New Bid Bond Step 1 of 4

<a href="#">Login</a>
<a href="#">Main Menu</a>
<a href="#">Contractors</a>
<a href="#">Employees</a>
<a href="#">FAQ</a>
<a href="#">Documentation</a>
<a href="#">Help</a>

Contractor Information:

Company Name:

Address:

City:

State:

Zip Code:

Owner/Obligee/Job Information:

Owner/Obligee:

Bid Bond Form:

Address:

City:

State:

Zip Code:

Bid Date:

Estimated Contract Price:

Amount of Bid Security:

Contract # or IFB#:

Description of Job:

Bid Bond Status: Approved Pending

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This is the screen after you click on "new bond". First enter the first few letters of the contractors name in the top field. (if the contractor has not been entered into Surety2000 you will have to enter the contractor information into the system. It's easy and we'll show you later). For this presentation we are using ABC Contracting Inc. Enter abc into the field and click "next".

Figure 50

3/1/99 3:45 PM



# **SURETY 2000**

## **BID BOND MANAGER**

*Bid Bond Approval System Version 1.0*

Insurance Agency  
John Doe

3/1/99

- **Enter New Bid Bond Step 2 of 4**

- [Login](#)
- [Main Menu](#)
- [Contractors](#)
- [Employees](#)
- [FAQ](#)
- [Documentation](#)
- [Help](#)

Select the Contractor for this bid by selecting the Company Name: Page 1 of 1

Entry	Contractor Name	Address	Phone No
1	ABC CONTRACTING, INC.	ANYWHERE, NY	111-222-3333

Search for Contractor Name:

Search For:

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Surety2000 found the contractor for you. Sometimes Surety2000 will find several contractors for you with similar names. You pick the exact name by clicking on the name. In this case there is only one ABC Contracting Inc. If there was ABC Plumbing, ABC Electrical, etc. you would choose from that selection.

Click on ABC.



**SURETY 2000**  
**BID BOND MANAGER**  
*Bid Bond Approval System Version 1.0*

Insurance Agency  
 John Doe

3/2/99

• Enter New Bid Bond Step 3 of 4

Contractor Information:

Contractor: **ABC CONTRACTING, INC.**

Address: **100 SMITH STREET**

City: **ANYWHERE**

State: **NY**

Zip Code: **1111111**

Surety:  

Owner/Obligee/Job Information:

Owner/Obligee:

Bid Bond Form:  

Address:

Additional Address:

City:

State:  

Zip Code:

Bid Date:

Estimated Contract Price:

Amount of Bid Security:

Contract # or IFB#:

Description of Job:

Bid Bond Status:  Approved  Pending

Next > 

The contractor's name that you chose is inserted in the field. This will avoid clerical errors. Move down to "surety". The scroll down screen will list all the sureties that have authorized you. They can rescind that authority at any time from their Surety2000 website.

Complete the remaining fields. The estimated contract price is optional. Surety2000 is Year 2000 compliant. (Insert 1999 in the field for year).

Figure 8



# **SURETY 2000**

## **BID BOND MANAGER**

**Bid Bond Approval System Version 1.0**

Insurance Agency  
John Doe

3/2/99

→ Enter New Bid Bond Step 3 of 4

Contractor Information:

Contractor: **ABC CONTRACTING, INC.**

Address: **100 SMITH STREET**

City: **ANYWHERE**

State: **NY**

Zip Code: **1111111**

Surety: **Liberty Mutual Insurance Co.** 

Owner/Obligee/Job Information:

Owner/Obligee: **State of Virginia Department of Transportation**

Bid Bond Form: **Bid Bond in accordance with contract specifications**

Address:

Additional Address:

City:

State: **Virginia** 

Zip Code: **12345**

Bid Date: **02/ 21/ 1999**

Estimated Contract Price: **optional**

Amount of Bid Security: **ten percent of bid bond not to exceed .....**

Contract # or IFB#:

**654321**

**insert job description here**

Description of Job:

Bid Bond Status:  **Approved**  **Pending**

**Next >**

Complete all the fields remaining. You may pend this bond or approve it. Let's approve this bid bond. Be sure the approved circle is highlighted then click "next"

# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/1/99

<a href="#">Login</a>
<a href="#">Main Menu</a>
<a href="#">Contractors</a>
<a href="#">Employees</a>
<a href="#">FAQ</a>
<a href="#">Documentation</a>
<a href="#">Help</a>

Please Verify the information below is correct then Finish.

Date of Bid Bond Entry: 3/1/99 7:08:08 PM

Entered by: John Doe

Surety Name: Liberty Mutual Insurance Co.

NAIC#: 23043

State of Incorporation: MA

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET, ANYWHERE, NY 111111

Owner/Obligee: State of Virginia Department of Transportation

Address:

Additional Address:

Bid Bond Form: BidBond in accordance with Contract Specifications

Bid Date: 2/21/1999

Contract Price optional

Amount of Bid Security: ten percent of amount bid not to exceed...

Contract # or IFB#: 654321

Description of Job: insert description of project here.

Bid Bond Status: Approved

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This is a final review of all the information before the bid bond is executed. THE DATE OF THE ENTRY TO THE SECOND IS ARCHIVED. The entry date and time will become the time of execution on the next screen. Note: just as a paper bid bond must be issued on time for a bid letting, a Surety2000 bid bond must be approved prior to the bid letting time. The owner/obligee will take note of this time. The NAIC code is also listed in order to specifically identify the surety.

Review the information and click on "Finish". The next screen is the bid bond.



# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/1/99

- The Following Bond has been Approved

S2000 Bond ID: SVA991001340

Date of Bid Bond Entry: 3/1/99 7:08:08 PM

Date of Bid: 2/21/99

Date of Bid Bond Approval: 3/1/99 7:11:47 PM

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET, ANYWHERE, NY 111111

Surety Name: Liberty Mutual Insurance Co.

State of Incorporation: MA

NAIC#: 23043

Owner/Obligee: State of Virginia Department of Transportation

Address: , VA 12345

Amount of Bid Security: ten percent of amount bid not to exceed...

Description of Job: insert description of project here.

Bond Form: BidBond in accordance with Contract Specifications

Contract # or IFB#: 654321

Entered by: John Doe

Owner/Obligee

Contractor

This is your electronic bid bond. The code at the top is the "authorization code". This code must be given to your contractor. The contractor will present this code at the bid letting along with the bid. The owner/obligee will login to Surety2000, insert the "authorization code" and view the bid bond as you see it here.

The surety will be able to view all executed bid bonds by their agents.

You may print this screen and use it to fax the code to your contractor and retain it for your records.

A bid bond can be executed or put into pending by knowledgeable surety personnel in less than ninety seconds.

Surety2000 has been proven to save money, decrease errors, deter fraud, and provide an overall better service to your contractor.

# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/1/99

### Enter Contractor Information Below

<a href="#">Login</a>
<a href="#">Main Menu</a>
<a href="#">Contractors</a>
<a href="#">Employees</a>
<a href="#">FAQ</a>
<a href="#">Documentation</a>
<a href="#">Help</a>

Company Name	abc contracting
Contact Person	optional
Phone Number	optional
Address	required
City	required
State	Alabama
Zip Code	required
<input type="button" value="Submit"/>	

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Complete information that must be reproduced on the bid bond such as complete name and address. Contact person and telephone number is optional. Click "submit" and you can execute their first bond.

# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/1/99

<a href="#">Login</a>
<a href="#">Main Menu</a>
<a href="#">Contractors</a>
<a href="#">Employees</a>
<a href="#">FAQ</a>
<a href="#">Documentation</a>
<a href="#">Help</a>

Contractors Menu

<a href="#">Search</a>	<a href="#">New Contractor</a>
------------------------	--------------------------------

Search for Contractors By:

Company Name  Contact Name

Search For:

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A contractor has to be entered into Surety2000 before a bid bond can be executed. There is no fee for entering a contractor. As you use the system you will enter a contractor when you are entering the first bid bond for that contractor. (You could enter your entire list all at once if you choose.)

Go to the vertical column at the left. Click on "contractors". You can search for an existing contractor or enter "new contractor". Click on "new contractor" and complete the fields on the next screen.



# SURETY 2000

## BID BOND MANAGER

Bid Bond Approval System Version 1.0

Insurance Agency  
John Doe

3/1/99

Surety Employee List

[Search](#) [New Employee](#)

You may select Edit, Add, or Delete from the table below: Page 1 of 1

Surety Agent	User Name	Phone	Action...
John Doe	Insurance	555-555-5555	<a href="#">Edit...</a> <a href="#">Delete</a>

[Login](#)  
[Main Menu](#)  
[Contractors](#)  
[Employees](#)  
[FAQ](#)  
[Documentation](#)  
[Help](#)

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You can grant employees power of attorney. A surety must enter your agency first and empower on person and grant that person administration ability. That individual can enter or delete powers from employees.

Use the vertical bar at the left. Click "employees". Click "new employees" on the horizontal bar.

Figure 13



**SURETY 2000**  
**BID BOND MANAGER**  
*Bid Bond Approval System Version 1.0*

Insurance Agency  
 John Doe

3/1/99

Enter Employee Information Below 7995

Employee Name	John Doe
Address	Broadway
City	Anywhere
State	NY
Zip Code	121212
Phone Number	555-555-5555
Login Name	Insurance
Password	*****
Verify Password	*****
Admin Access	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

©1997 AAWS Web Services

Complete the fields. Allow the employee to enter their own password. Decide if you want to pass on the administration ability or not. Click "submit" and that employee can login to Surety2000. You can enter this section, search for an employee and "unauthorize" within seconds.

A password cannot be retrieved by anyone or even Surety2000. If a password is forgotten a new password must be submitted.



# **SURETY 2000**

## **BID BOND MANAGER**

**Bid Bond Approval System Version 1.0**

• Enter your login information and push the Login button.  
You must have a valid user name and password to access the system!

User Name:  Password:

**Authorized access only!**  
**Do NOT give your user information to ANYONE!**

**Navigation Menu:**

- [Login](#)
- [Introduction](#)
- [Jobs](#)
- [News](#)
- [Documentation](#)
- [FAQ](#)
- [Help](#)

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This is the login page. You will need a user name and password. Each owner/obligee will be given one user name by Surety2000. That person will choose a password and also decide who will be able to use the system within their agency. An owner/obligee can only view executed bid bonds. No changes or transactions can be made.

We have used the State of Illinois Department of Transportation for the purposes of this presentation. The user name and password are entered and then click next.

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Figure 15



# **SURETY 2000**

## **BID BOND MANAGER**

**Bid Bond Approval System, Version 1.0**

State of Illinois Department of Transportation  
Jeff Heck

3/3/99

<a href="#">Login Page</a>
<a href="#">Main Menu</a>
<a href="#">Jobs</a>
<a href="#">News</a>
<a href="#">Documentation</a>
<a href="#">FAQ</a>
<a href="#">Help</a>

### Owner Main Menu

Welcome to the Surety 2000 Bid Bonds Approval Tracking System.

Select one of the Menu Options from the panel on the left or us the search feature below.

You can view your entire data base by leaving the search field empty.

If you have questions, you may refer to the Help button for instruction at anytime.

### Search Bonds By:

Bond Number

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This is the owner main menu. At the bid letting contractors will present "authorization codes". Simply insert the code in the "bond number" field and click submit. The code begins with "s". (surety). The next two letters are the State (il. Illinois). The next two numbers are the year the bond was executed (99). The remaining numbers are unsequenced and selected by the Surety2000 server.

16

Figure 16



# **SURETY 2000**

## **BID BOND MANAGER**

*Bid Bond Approval System Version 1.0*

State of Illinois Department of Transportation  
Jeff Heck

3/3/99

<a href="#">Login Page</a>
<a href="#">Main Menu</a>
<a href="#">Jobs</a>
<a href="#">News</a>
<a href="#">Documentation</a>
<a href="#">FAQ</a>
<a href="#">Help</a>

• The Following Bond has been Executed

**S2000 Bond ID: SIL991001343**

**Date of Bid Bond Approval: 3/3/99 2:55:22 PM**

**Contractor: ABC CONTRACTING, INC.**

**Address: 100 SMITH STREET, ANYWHERE, NY 1111111**

**Surety Name: Reliance Surety Company**

**State of Incorporation: PA**

**NAIC#: 41980**

**Owner/Obligee: State of Illinois Department of Transportation**

**Address: , , IL 12345**

**Amount of Bid Security: ten percent of bid amount not to exceed...**

**Description of Job: insert description of job here...**

**Bond Form: BidBond in accordance with Contract Specifications**

**Contract # or IFB#: 456123**

**Entered by:**

**Executed by: Joseph V. Sforzo**

Search Bonds By:

Bond Number

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This is the electronic Surety2000 bid bond. The exact date and time of the bid bond approval is archived. The name of the surety and the NAIC code is submitted. This code designates the exact surety and avoids the confusion of similar surety names. The name of the person who executed the bid bond is at the very bottom.

All information that is inserted in bid bond forms is presented here. The bid bond form is herein agreed that it is the form within the specification.

This screen can be printed and retained.

Simply insert the next authorization code in the bond number field and click submit to view the next bid bond.

Figure 17

## BMS V2 Major Navigation Areas

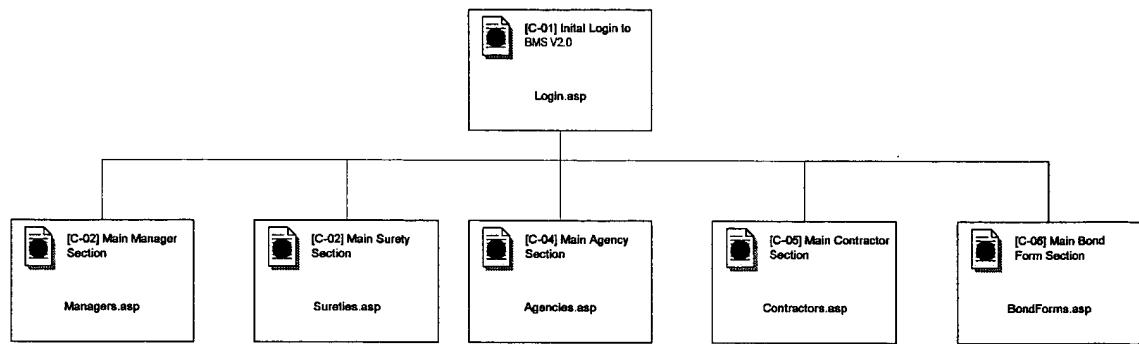


Figure 18

## BMS Login Form

CompanyID:

Username:

Password:



Figure 19

## Manager Feature Section Layout

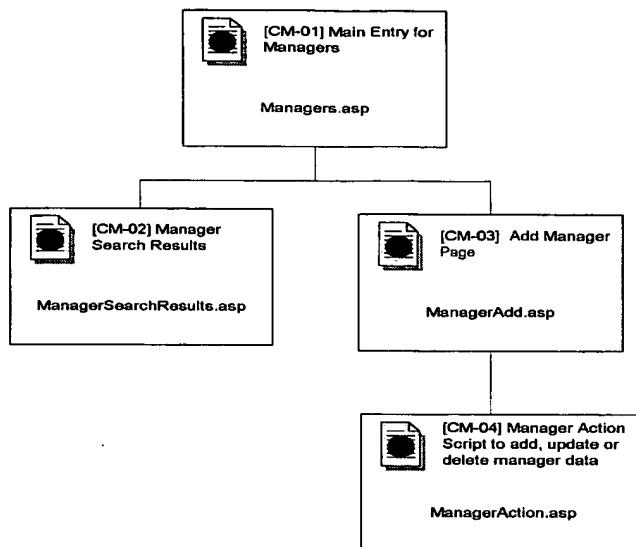


Figure 20

Company Name:

Contact Person:

Phone Number:

Address:

City:

State / Province:

 -- State or Province -- 

Zip:

Country:

Add

Figure 21

## Surety Feature Section Layout

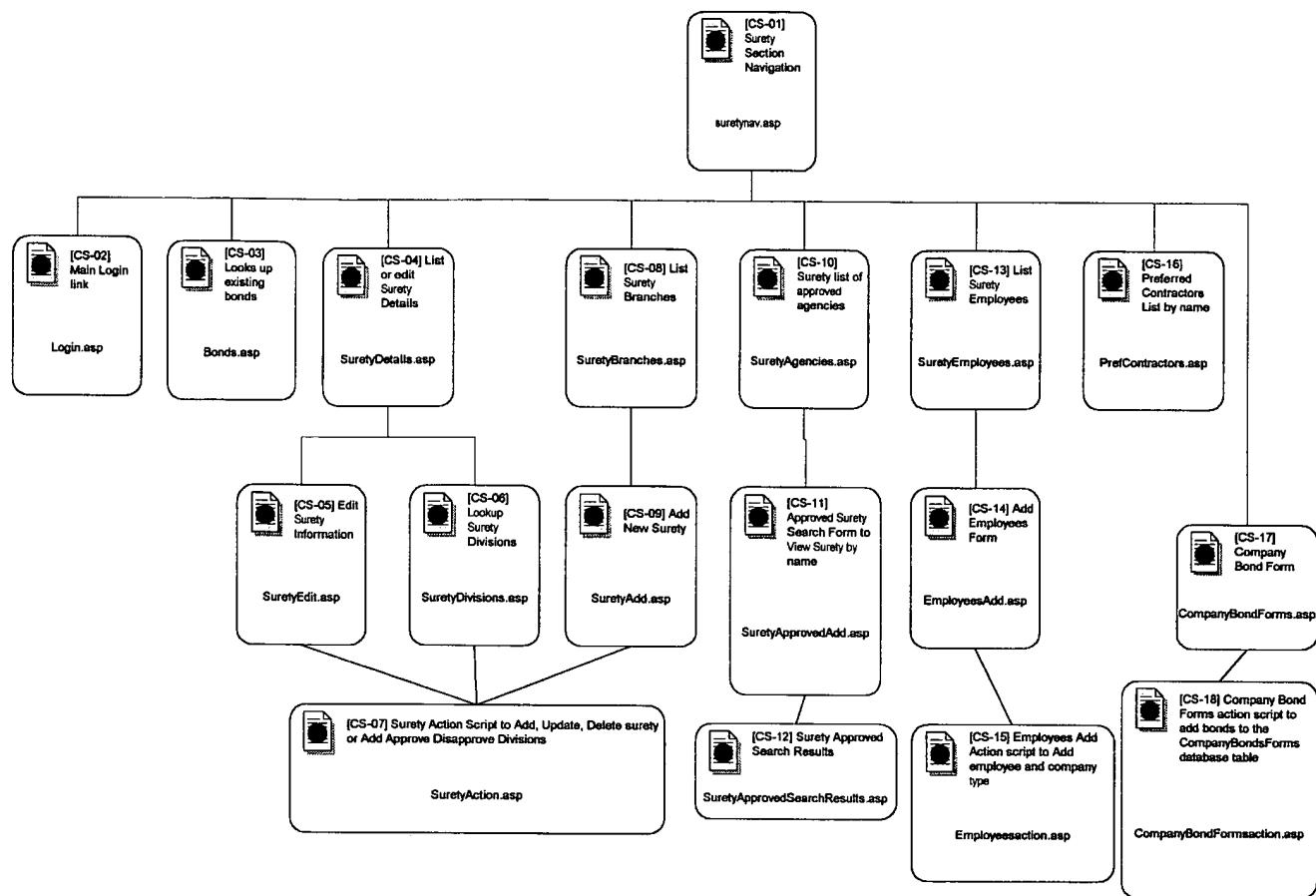


Figure 22

Company Name:

Contact Person:  Phone Number:

Address:

City:

State / Province:  Zip:  Country:

State Of Incorporation  NAIC Number:

 Update

Figure 23

Division:

Address:

City:

State / Province:  Zip:  Country:

State Of Incorporation  NAIC Number:

Figure 24

Company Name:

Contact Person:

Phone Number:

Address:

City:

State / Province:

Zip:

Country:

State Of Incorporation

NAIC Number:

Add

F, g 25

First Name	Last Name	
<input type="text"/>	<input type="text"/>	
Title		
<input type="text"/>		
Address		
<input type="text"/>		
<input type="text"/>		
City:		
<input type="text"/>		
State / Province:		
Zip:	<input type="text"/>	
Country:	<input type="text"/>	
Phone	Permissions	
<input type="text"/>	<input type="text"/>	
Username:	Password:	Verify Password:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>		

Figure 26

## Agency Feature Section Layout

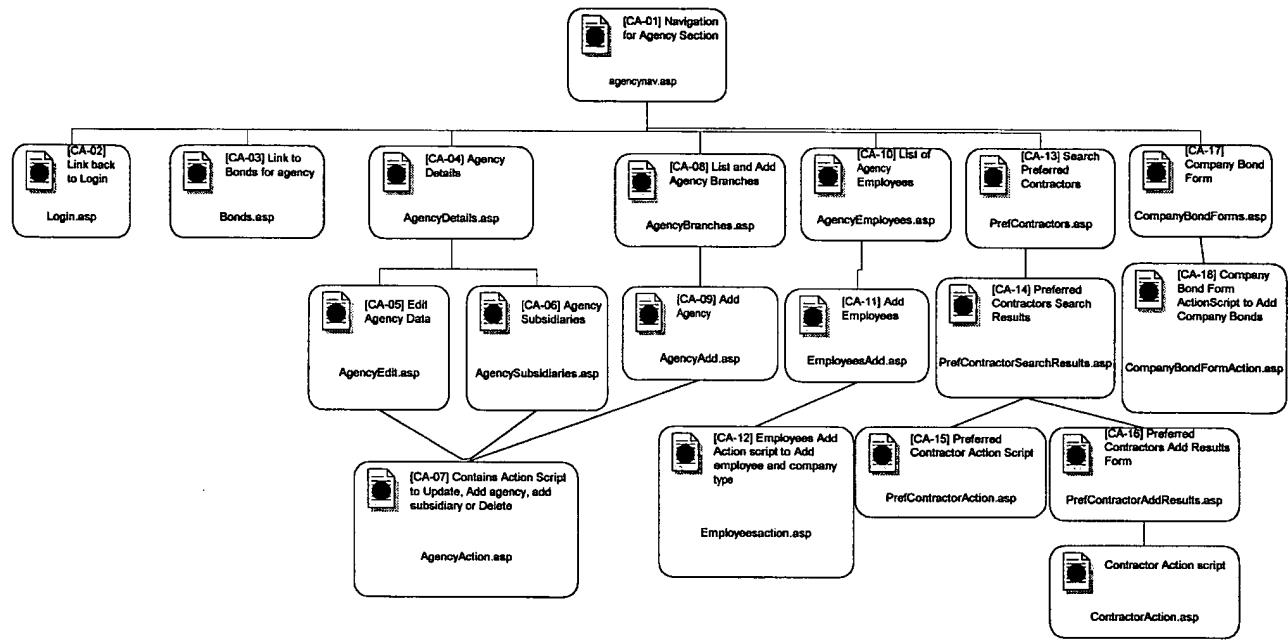


Figure 27

Company Name:

Contact Person:

Phone Number:

Address:

City:

State / Province:

Zip:

Country:

Fig 28

Subsidiary:

Address:

City:

State / Province:

Zip:

Country:

Add

Figure 29

First Name	Last Name	
<input type="text"/>	<input type="text"/>	
Title		
<input type="text"/>		
Address		
<input type="text"/>		
<input type="text"/>		
City:		
<input type="text"/>		
State / Province:	Zip:	Country:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone	Permissions	
<input type="text"/>	<input type="checkbox"/>	
Username:	Password:	Verify Password:
<input type="text"/>	<input type="text"/>	<input type="text"/>
 Add		

Figure 30

**Add Preferred Contractor:** To add to your list of preferred contractors, search for the contractor you wish to add using the form below.

Federal Tax ID:

Figure 31

### Contractor Feature Section Layout

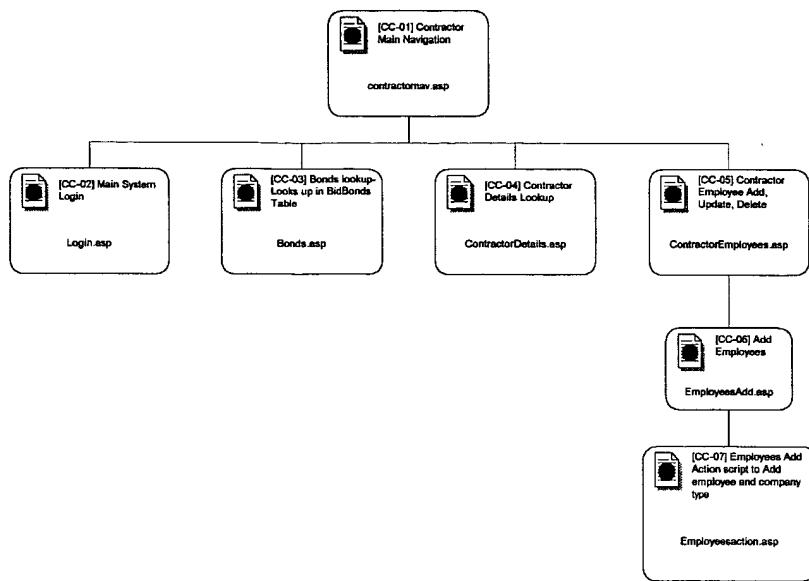


Figure 32

Company Name:

Tax ID Number:

Phone Number:

Address:

City:

State / Province:

Zip:

Country:

Add

Figure 33

First Name	Last Name		
<input type="text"/>	<input type="text"/>		
Title			
<input type="text"/>			
Address			
<input type="text"/>			
<input type="text"/>			
City:			
<input type="text"/>	State / Province:	Zip:	Country:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone	Permissions		
<input type="text"/>	<input type="text"/>		
Username:	Password:	Verify Password:	<input type="text"/>
<input type="button" value="Add"/>			

Figure 34

## Owner Feature Section Layout

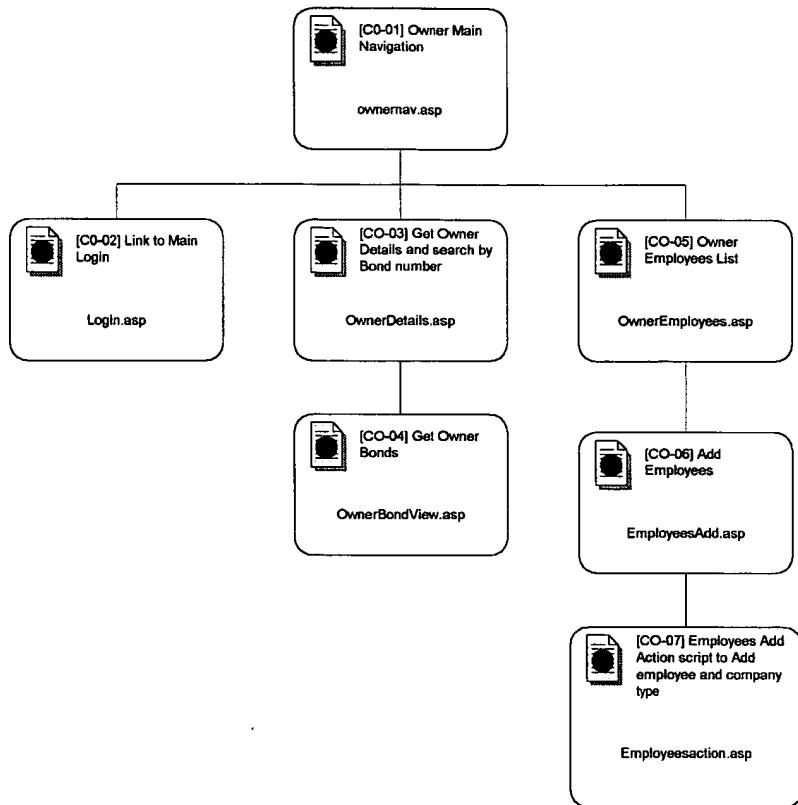


Figure 35

First Name	Last Name	
<input type="text"/>	<input type="text"/>	
Title		
<input type="text"/>		
Address		
<input type="text"/> <input type="text"/> <input type="text"/>		
City:		
<input type="text"/>		
State / Province:	Zip:	Country:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone	Permissions	
<input type="text"/>	<input type="text"/>	
Username:	Password:	Verify Password:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>		

Figure 36

## Bond Feature Section Layout

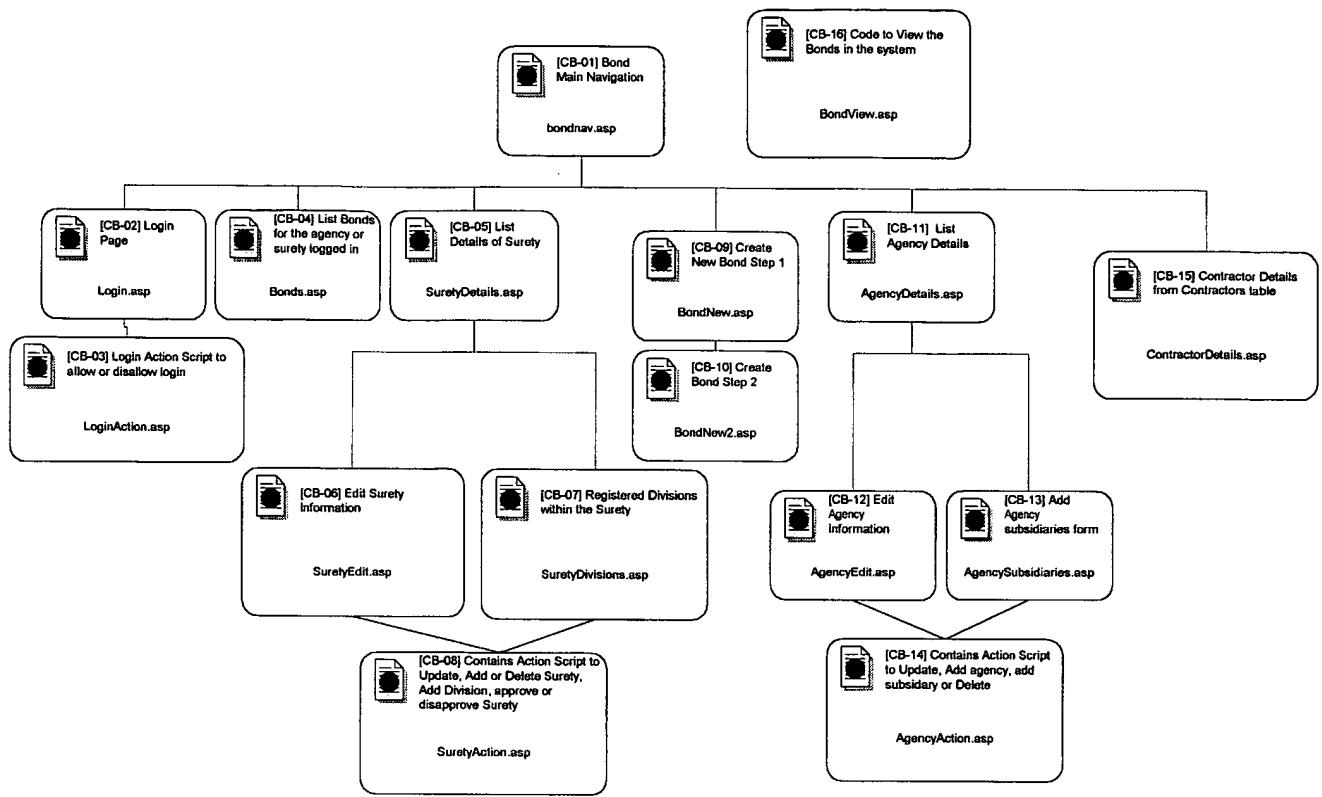


Figure 37

Form used to update existing surety information. The update form appears below.

Company Name:

Contact Person:

Phone Number:

Address:

City:

State / Province:

Zip:

Country:

State Of Incorporation

NAIC Number:

Update

Figure 38

Division:

Address:

City:

State / Province:

Zip:

Country:

State Of Incorporation

Add

Figure 39

Contains form to update Agency information. The form used appears below:

Company Name:

Contact Person:

Phone Number:

Address:

City:

State / Province:

Zip:

Country:

Update

Figure 40

The add subsidiaries form appears below:

Subsidiary:

Address:

City:

State / Province:

Zip:

Country:

Add

Figure 41

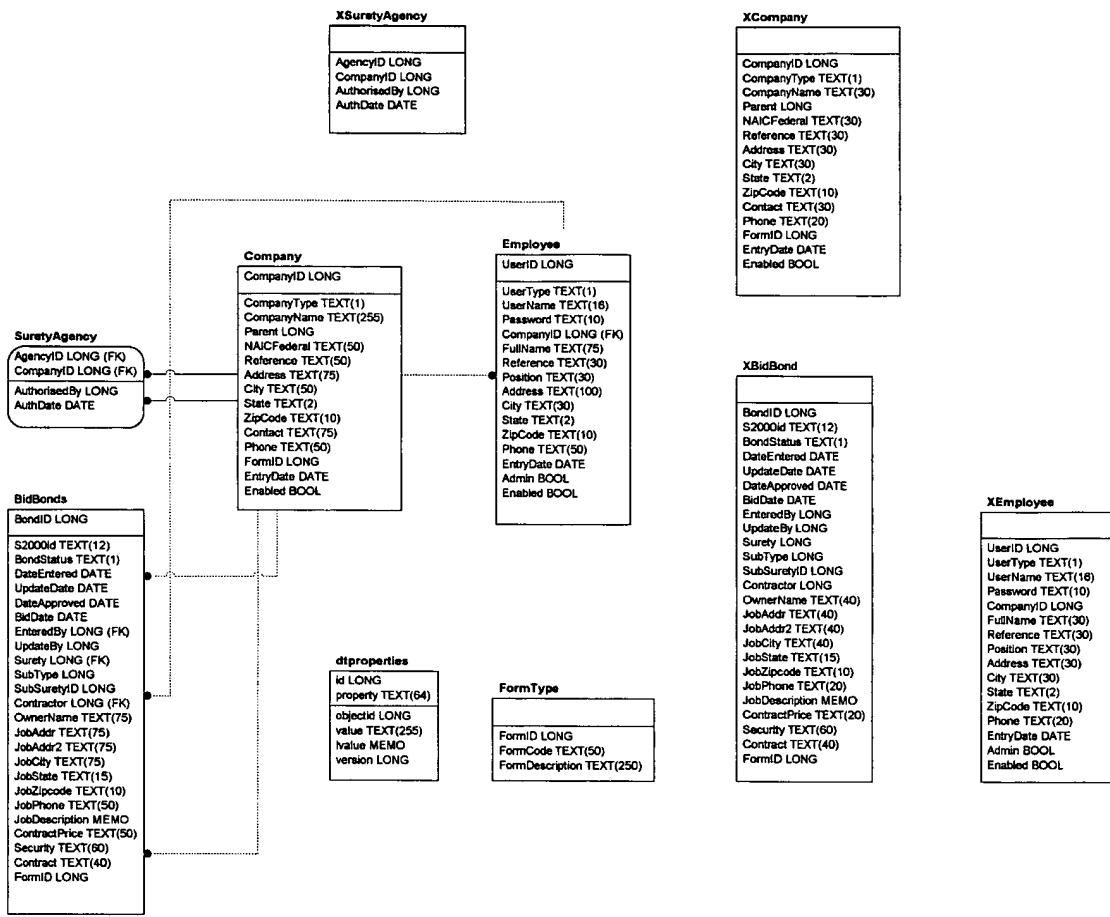


Figure 43